

Marin County Establishment Size Evolution

Focus on Post-Recession Recovery

Q3 –2024 Update

Produced by

Marin Economic Consulting


March 7, 2025

Jon Haveman, Principal

415-336-5705 or Jon@MarinEconomicConsulting.com

Contents

1. Overview of Establishment Size Changes Since the Onset of the Great Recession	2
2. Relative Establishment Size Over Time	4
3. Detailed Relative Establishment Size Evolution by Industry	5
4. Growth in # of Establishments	11
5. Descriptions and References	16



1. Overview of Establishment Size Changes Since the Onset of the Great Recession

Figure 1 - 1: Average Establishment Size

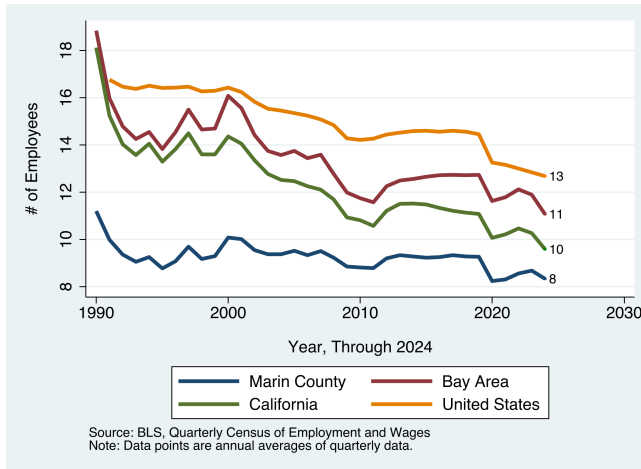


Figure 1 - 2: Growth in Establishment Numbers

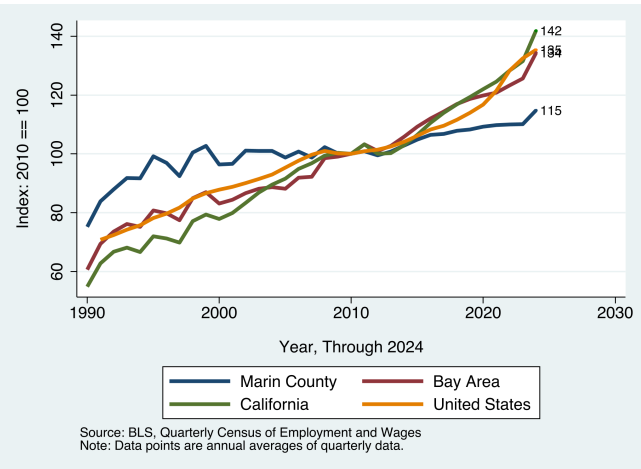


Figure 1 - 3

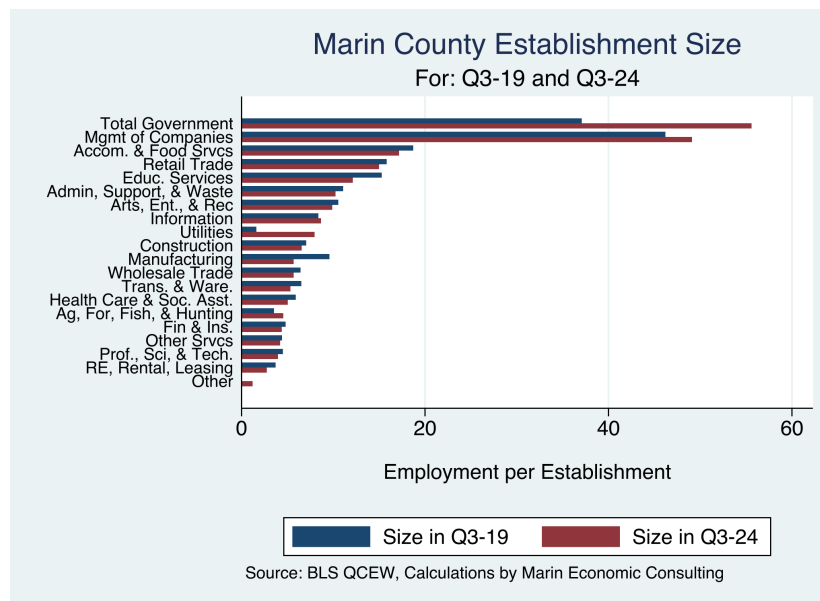


Table 1.1: Quarterly Summary for Q3 – 2024

Sector	Levels in Q3 – 2024				Change vs Q3 in 2007			
	Establishments		Relative Size		Establishments		Relative Size	
	#	Ave. Size	v. Bay	v. U.S.	#	Ave. Size	v. Bay	v. U.S.
Health Care & Soc. Asst.	3,155	5.0	1.4	0.5	2,225	–6.92	0.54	–0.12
Prof., Sci., & Tech.	2,097	4.0	0.3	0.6	326	–2.31	–0.21	–0.16
Other Svcs	1,512	4.2	0.9	0.8	–834	1.60	–0.46	0.13
Construction	1,122	6.6	0.6	0.8	37	–1.04	–0.01	–0.12
Retail Trade	878	15.0	1.0	1.1	–125	0.37	0.10	0.06
RE, Rental, Leasing	726	2.7	0.6	0.6	164	–1.94	–0.14	–0.24
Accom. & Food Svcs	669	17.2	1.1	1.0	44	0.21	0.16	0.09
Fin & Ins.	617	4.4	0.4	0.4	–29	–5.12	–0.30	–0.37
Admin, Support, & Waste	594	10.2	0.6	0.8	23	–1.00	0.03	0.18
Wholesale Trade	349	5.7	0.5	0.6	–93	–0.31	0.01	–0.03
Arts, Ent., & Rec	327	9.9	0.6	0.7	78	–2.13	–0.07	–0.03
Information	306	8.6	0.4	0.9	75	0.19	0.04	0.50
Total Government	267	55.6	0.7	0.8	10	17.89	0.04	0.25
Educ. Services	258	12.1	0.8	0.7	98	–3.77	0.01	0.04
Manufacturing	233	5.7	0.2	0.2	2	–0.10	0.04	0.03
Trans. & Ware.	101	5.3	0.3	0.3	–8	0.61	0.12	0.03
Ag, For, Fish, & Hunting	67	4.5	0.4	0.4	–26	0.16	0.01	0.06
Other	65	1.2	1.0	1.4	63	0.18	0.47	0.45
Mgmt of Companies	51	49.1	0.5	1.9	–4	9.12	–0.20	0.81
Utilities	12	7.9	1.1	0.3	5	1.99	0.23	0.16
Mining	2	0.0	0.0	0.0				
Total	13,408	8.3	0.8	0.7	2,033	–1.27	0.06	0.02

Source: BLS, QCEW; Calculations by Marin Economic Consulting

2. Relative Establishment Size Over Time

Table 2.1: Summary of Establishment Size versus the Bay Area as A Whole

Sector	Establishments in Q3 – 2024		Relative Establishment Size: Q3 of Each Year					
	#	Ave. Size	1990	1995	2001	2004	2007	2024
Health Care & Soc. Asst.	3,155	5.0	0.78	0.85	0.83	0.90	0.84	1.38
Prof., Sci., & Tech.	2,097	4.0	0.56	0.59	0.48	0.59	0.55	0.34
Other Svcs	1,512	4.2	0.86	0.92	1.14	1.15	1.34	0.88
Construction	1,122	6.6	0.62	0.56	0.65	0.68	0.64	0.64
Retail Trade	878	15.0	0.73	0.85	0.86	0.88	0.88	0.98
RE, Rental, Leasing	726	2.7	0.75	0.88	0.85	0.79	0.76	0.62
Accom. & Food Svcs	669	17.2	0.84	1.03	0.95	0.93	0.93	1.09
Fin & Ins.	617	4.4	0.83	0.96	0.78	0.70	0.73	0.42
Admin, Support, & Waste	594	10.2	0.38	0.43	0.55	0.57	0.55	0.58
Wholesale Trade	349	5.7	0.57	0.57	0.44	0.48	0.47	0.49
Arts, Ent., & Rec	327	9.9	0.68	0.66	0.63	0.64	0.63	0.55
Information	306	8.6	0.45	0.60	0.53	0.51	0.31	0.36
Total Government	267	55.6	0.77	0.74	0.66	0.67	0.69	0.73
Educ. Services	258	12.1	0.61	0.72	0.56	0.62	0.83	0.83
Manufacturing	233	5.7	0.31	0.28	0.26	0.19	0.17	0.20
Trans. & Ware.	101	5.3	0.35	0.41	0.36	0.28	0.18	0.30
Ag, For, Fish, & Hunting	67	4.5	0.51	0.57	0.46	0.43	0.34	0.36
Other	65	1.2			0.65	0.75	0.50	0.97
Mgmt of Companies	51	49.1	1.02	0.32	0.40	0.48	0.68	0.48
Utilities	12	7.9				0.81	0.83	1.06
Mining	2	0.0				0.00		0.00

Source: BLS, QCEW; Calculations by Marin Economic Consulting

Table 2.2: Summary of Relative Establishment Size versus California as A Whole

Sector	Establishments in Q3 – 2024		Relative Establishment Size: Q3 of Each Year					
	#	Ave. Size	1990	1995	2001	2004	2007	2024
Health Care & Soc. Asst.	3,155	5.0	0.68	0.76	0.82	0.84	0.79	1.48
Prof., Sci., & Tech.	2,097	4.0	0.59	0.68	0.57	0.69	0.70	0.55
Other Svcs	1,512	4.2	0.90	0.97	1.33	1.38	1.64	0.82
Construction	1,122	6.6	0.60	0.58	0.68	0.66	0.66	0.70
Retail Trade	878	15.0	0.76	0.88	0.91	0.88	0.90	1.06
RE, Rental, Leasing	726	2.7	0.78	0.94	0.87	0.78	0.75	0.63
Accom. & Food Svcs	669	17.2	0.76	0.98	0.90	0.85	0.87	1.00
Fin & Ins.	617	4.4	0.89	1.04	0.85	0.72	0.79	0.49
Admin, Support, & Waste	594	10.2	0.41	0.44	0.46	0.49	0.50	0.58
Wholesale Trade	349	5.7	0.60	0.59	0.50	0.52	0.52	0.57
Arts, Ent., & Rec	327	9.9	0.82	0.88	0.82	0.85	0.87	1.13
Information	306	8.6	0.51	0.63	0.66	0.58	0.36	0.58
Total Government	267	55.6	0.90	0.85	0.64	0.60	0.60	0.80
Educ. Services	258	12.1	0.41	0.58	0.62	0.65	0.70	0.73
Manufacturing	233	5.7	0.32	0.32	0.31	0.20	0.18	0.23
Trans. & Ware.	101	5.3	0.47	0.40	0.43	0.32	0.21	0.31
Ag, For, Fish, & Hunting	67	4.5	0.38	0.35	0.31	0.24	0.18	0.17
Other	65	1.2			0.50	1.23	0.82	1.03
Mgmt of Companies	51	49.1	1.24	0.38	0.47	0.54	0.80	0.83
Utilities	12	7.9				0.20	0.41	0.77
Mining	2	0.0				0.00		0.00

Source: BLS, QCEW; Calculations by Marin Economic Consulting

Table 2.3: Summary of Relative Establishment Size versus the United States as A Whole

Sector	Establishments in Q3 – 2024		Relative Establishment Size: Q3 of Each Year					
	#	Ave. Size	1990	1995	2001	2004	2007	2024
Health Care & Soc. Asst.	3, 155	5.0	0.50	0.49	0.59	0.59	0.58	0.47
Prof., Sci., & Tech.	2, 097	4.0	0.68	0.65	0.65	0.77	0.81	0.65
Other Srvcs	1, 512	4.2	0.66	0.52	0.65	0.61	0.68	0.81
Construction	1, 122	6.6	0.72	0.52	0.86	0.90	0.87	0.75
Retail Trade	878	15.0	0.98	0.82	0.95	0.95	0.99	1.05
RE, Rental, Leasing	726	2.7	0.86	0.85	0.88	0.81	0.81	0.57
Accom. & Food Srvcs	669	17.2	0.86	0.84	0.87	0.83	0.88	0.97
Fin & Ins.	617	4.4	1.18	0.94	0.83	0.75	0.78	0.41
Admin, Support, & Waste	594	10.2	0.49	0.42	0.52	0.55	0.61	0.78
Wholesale Trade	349	5.7	0.81	0.63	0.60	0.61	0.62	0.60
Arts, Ent., & Rec	327	9.9	0.83	0.67	0.69	0.68	0.70	0.67
Information	306	8.6	0.53	0.58	0.63	0.61	0.40	0.90
Total Government	267	55.6	0.97	0.95	0.57	0.52	0.54	0.79
Educ. Services	258	12.1	0.37	0.41	0.53	0.56	0.63	0.68
Manufacturing	233	5.7	0.28	0.22	0.25	0.16	0.15	0.18
Trans. & Ware.	101	5.3	0.58	0.43	0.52	0.36	0.25	0.27
Ag, For, Fish, & Hunting	67	4.5	0.50	0.50	0.50	0.39	0.33	0.39
Other	65	1.2			0.66	1.53	0.91	1.36
Mgmt of Companies	51	49.1	1.02	0.49	0.68	0.71	1.06	1.87
Utilities	12	7.9				0.16	0.17	0.33
Mining	2	0.0				0.00		0.00

Source: BLS, QCEW; Calculations by Marin Economic Consulting

3. Detailed Relative Establishment Size Evolution by Industry

Graphs present only Q3 data for each year. Ten largest industries are presented.

Figure 3 - 1: 92: Total Government

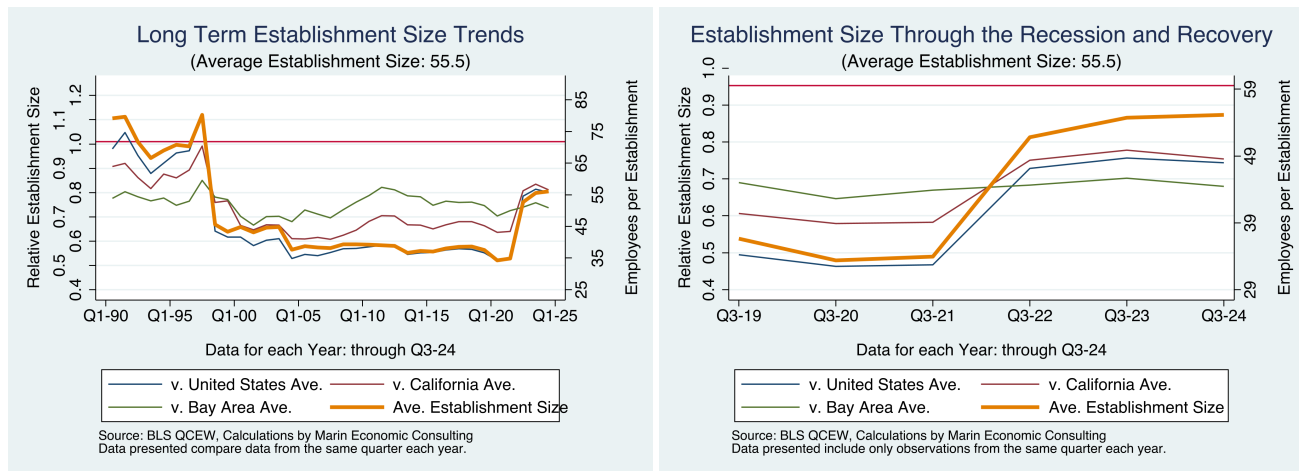


Figure 3 - 2: 55: Mgmt of Companies

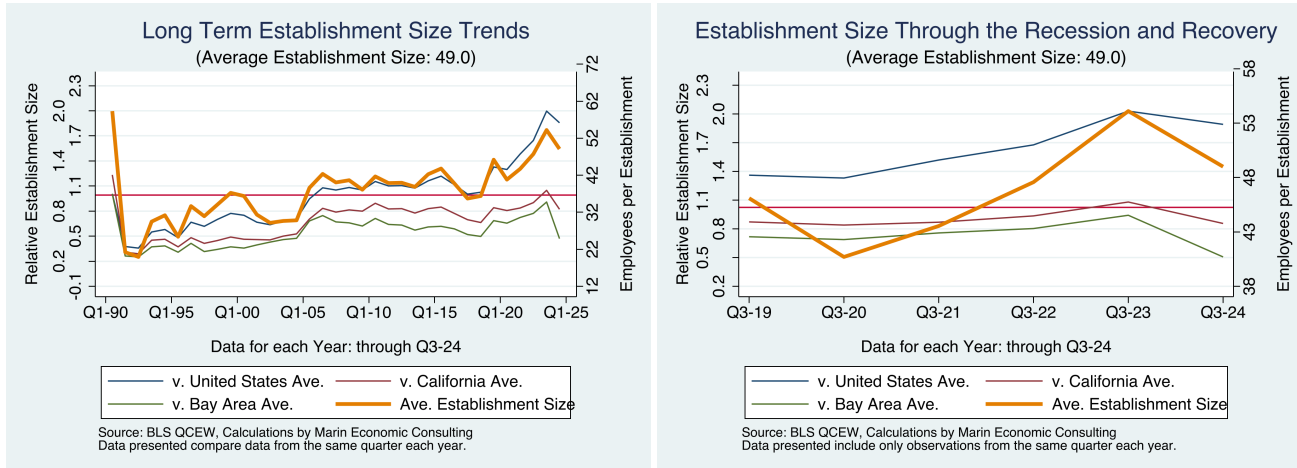


Figure 3 - 3: 72: Accom. & Food Svcs

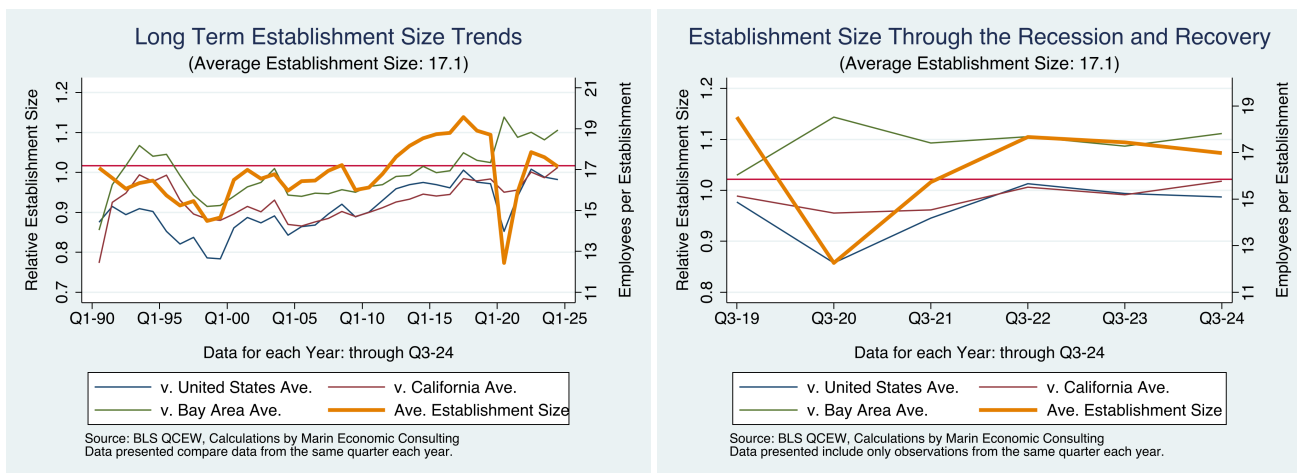


Figure 3 - 4: 44-45: Retail Trade

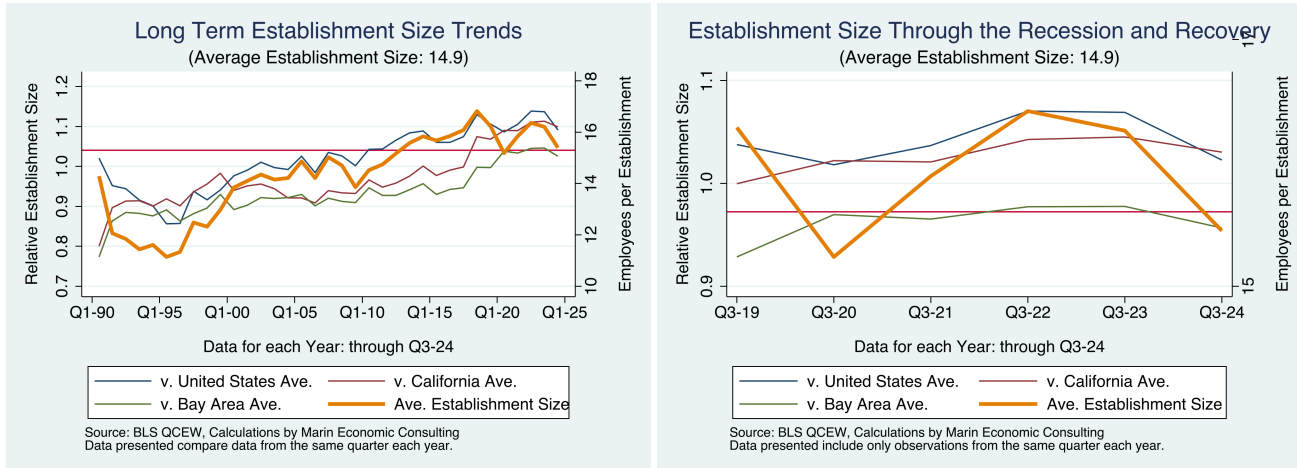


Figure 3 - 5: 61: Educ. Services

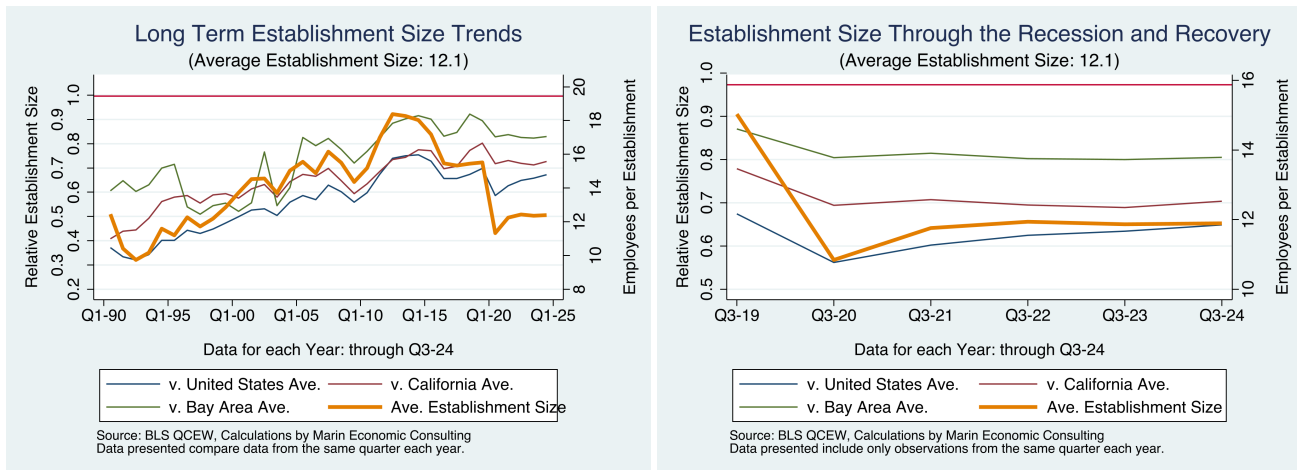


Figure 3 - 6: 56: Admin, Support, & Waste

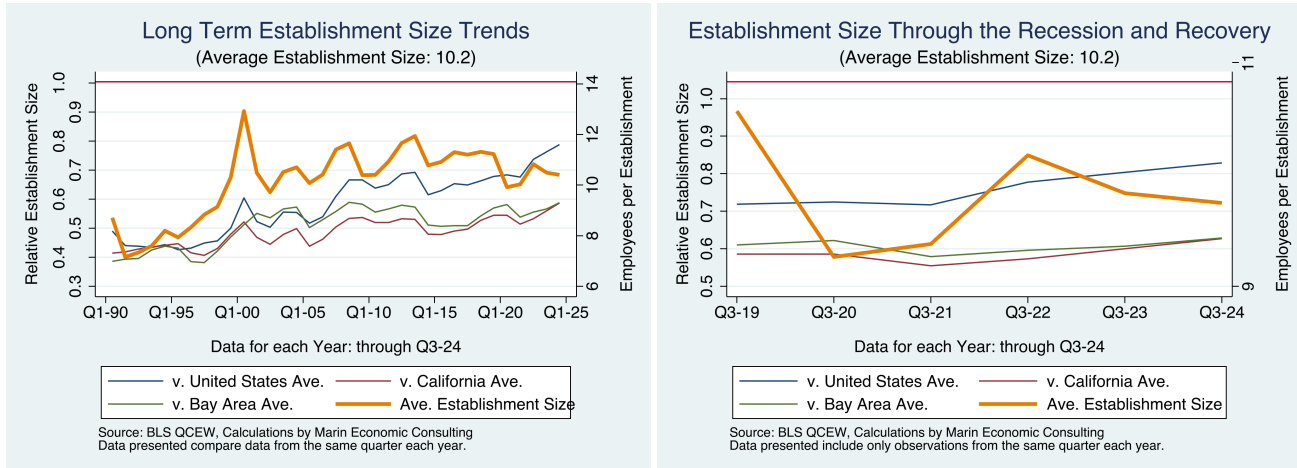


Figure 3 - 7: 71: Arts, Ent., & Rec

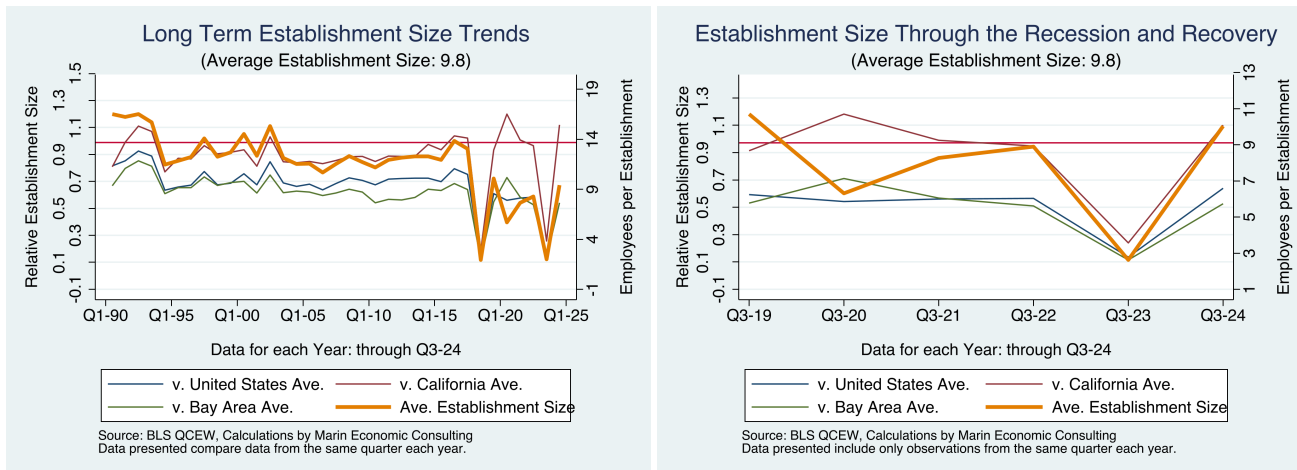


Figure 3 - 8: 51: Information

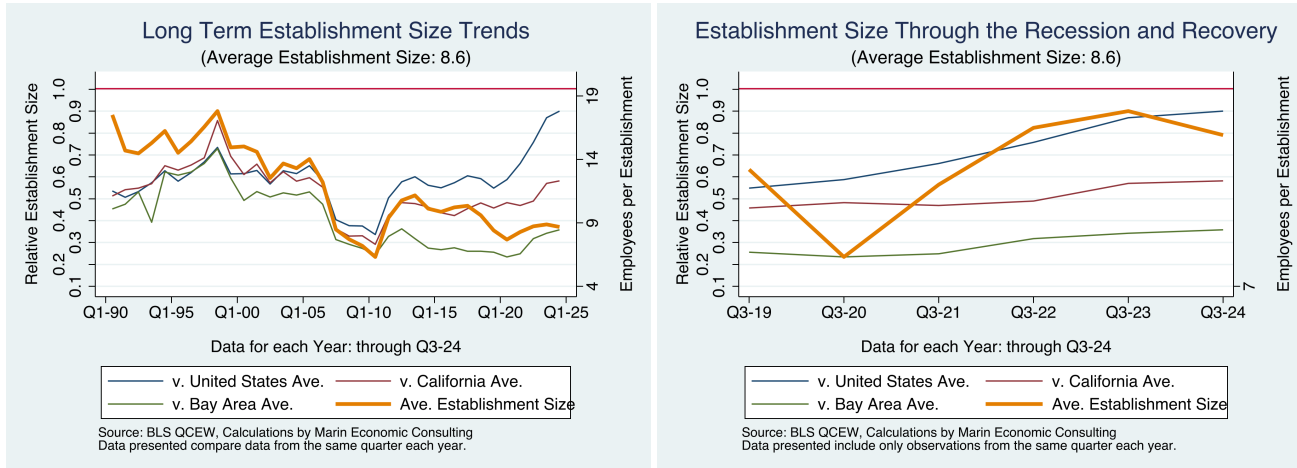
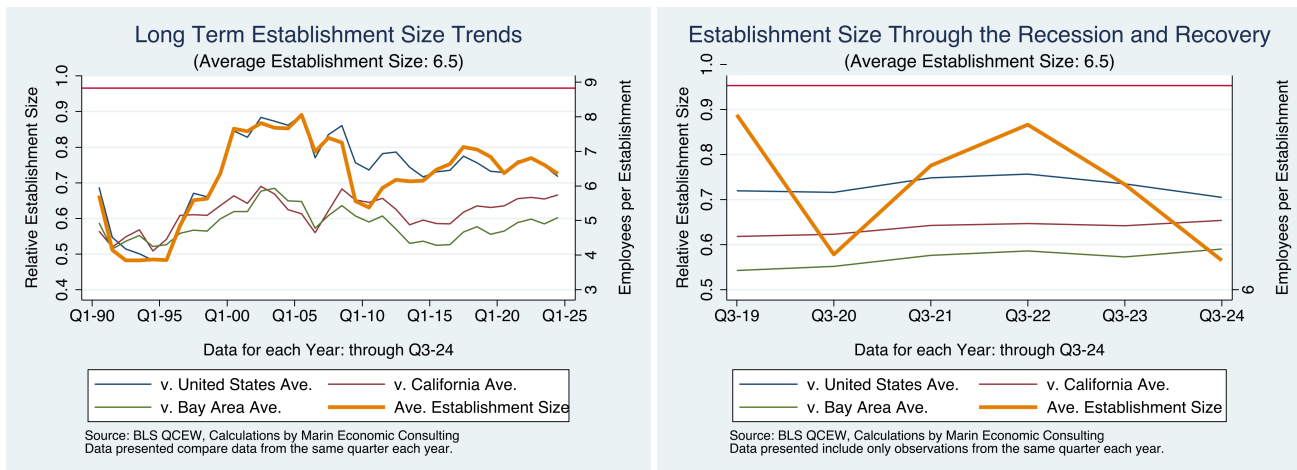


Figure 3 - 9: 22: Utilities



Figure 3 - 10: 23: Construction



4. Growth in # of Establishments

Graphs present only Q3 data for each year. Ten largest industries are presented.

Figure 4 - 1: 92: Total Government

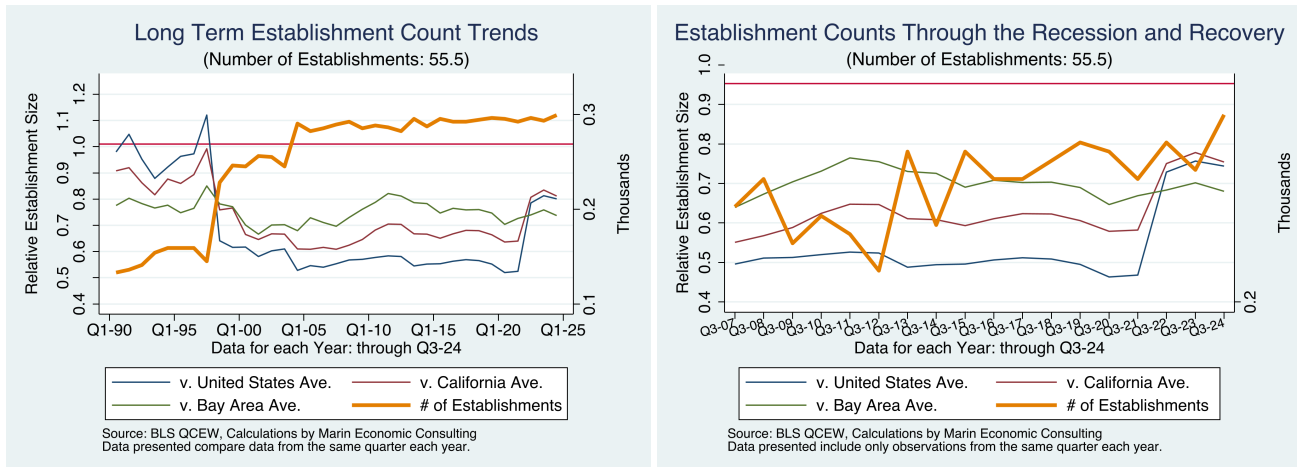


Figure 4 - 2: 55: Mgmt of Companies

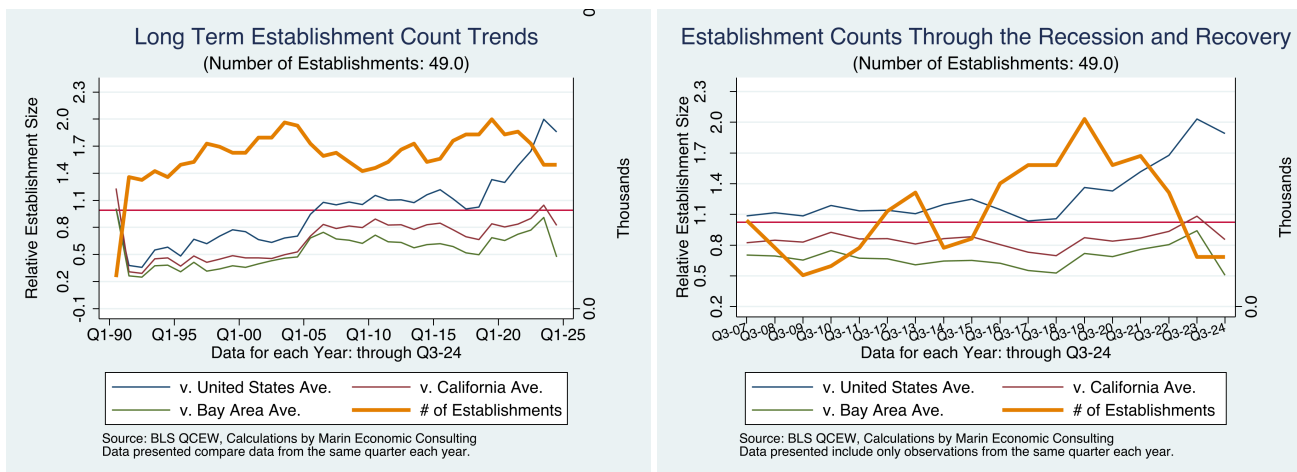


Figure 4 - 3: 72: Accom. & Food Svcs

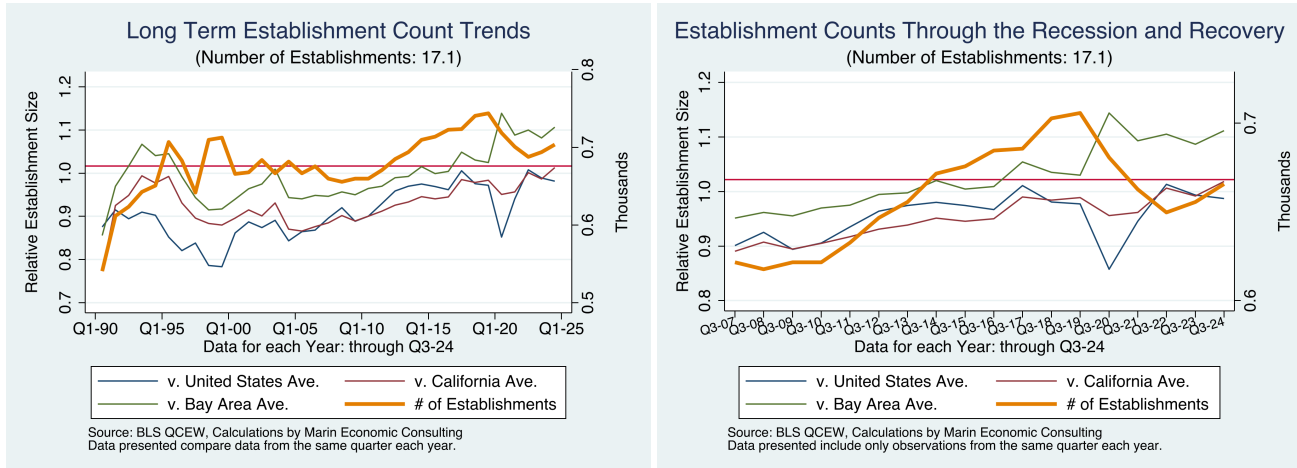


Figure 4 - 4: 44-45: Retail Trade

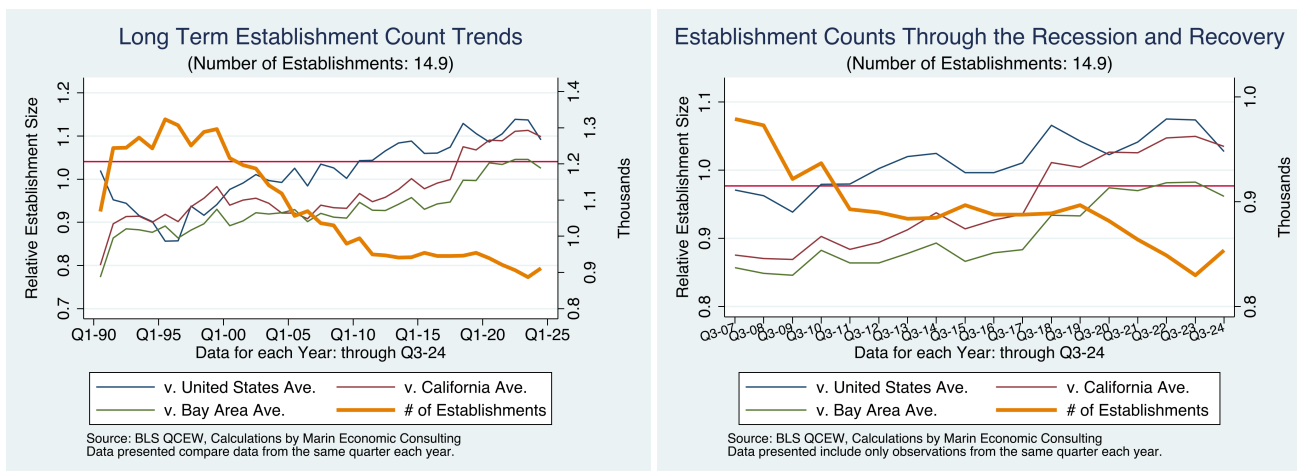


Figure 4 - 5: 61: Educ. Services

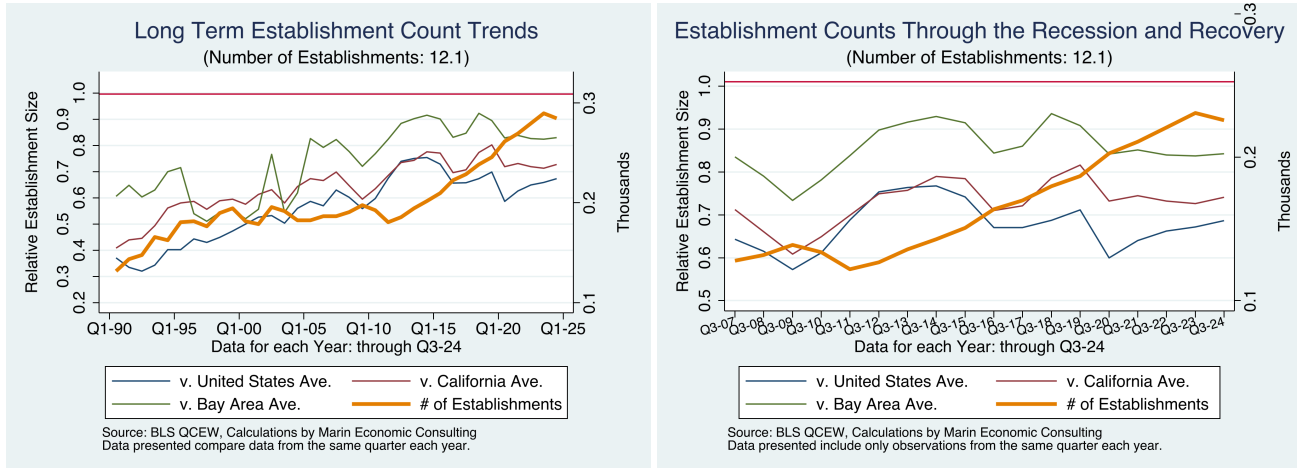


Figure 4 - 6: 56: Admin, Support, & Waste

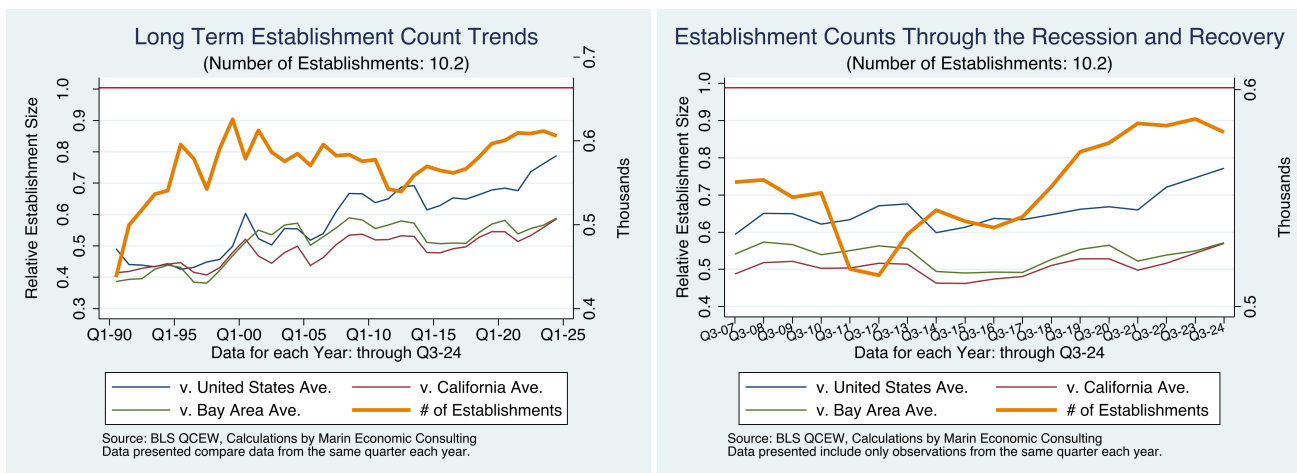


Figure 4 - 7: 71: Arts, Ent., & Rec

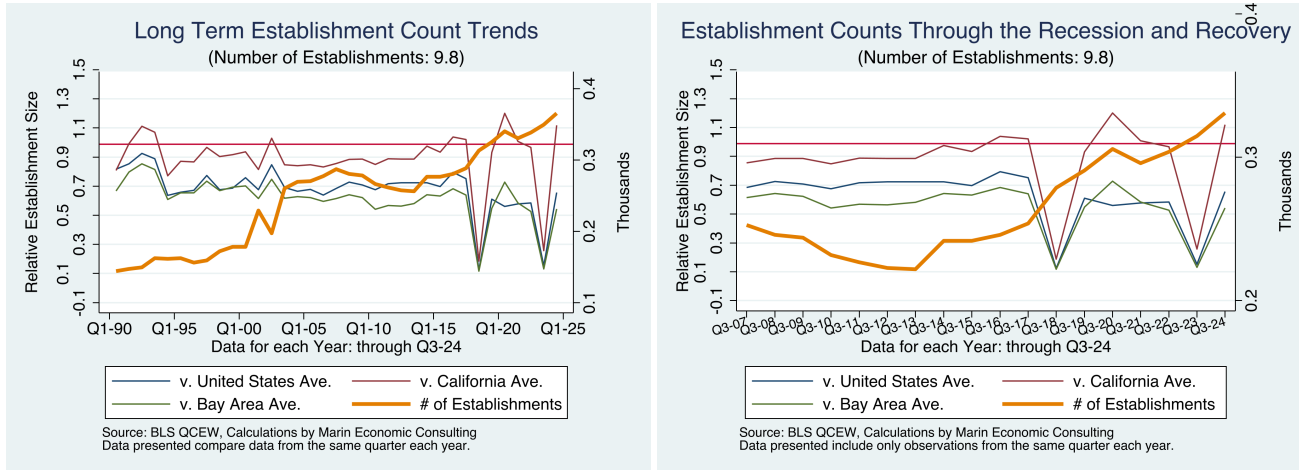


Figure 4 - 8: 51: Information

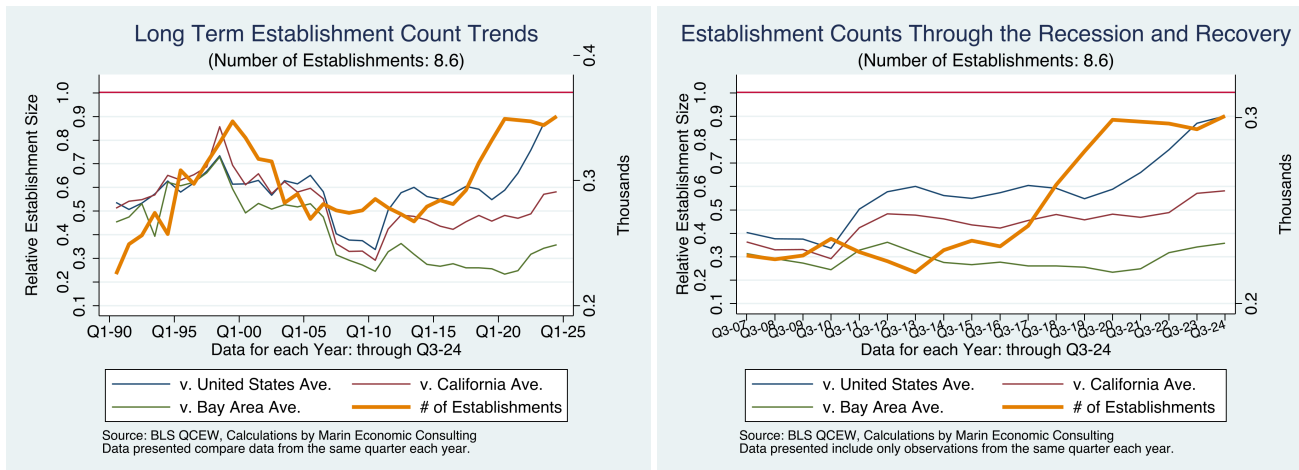


Figure 4 - 9: 22: Utilities

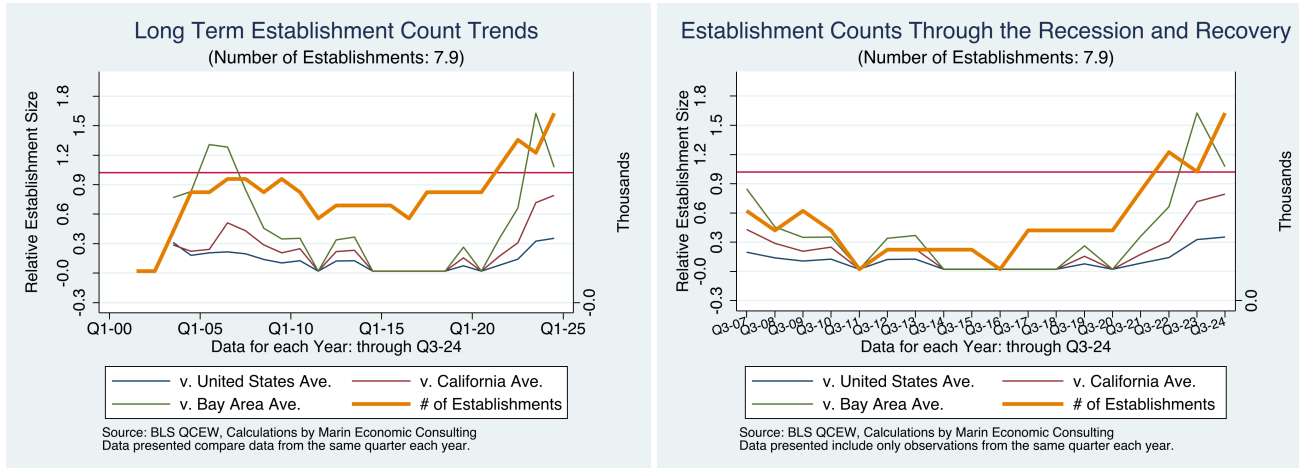
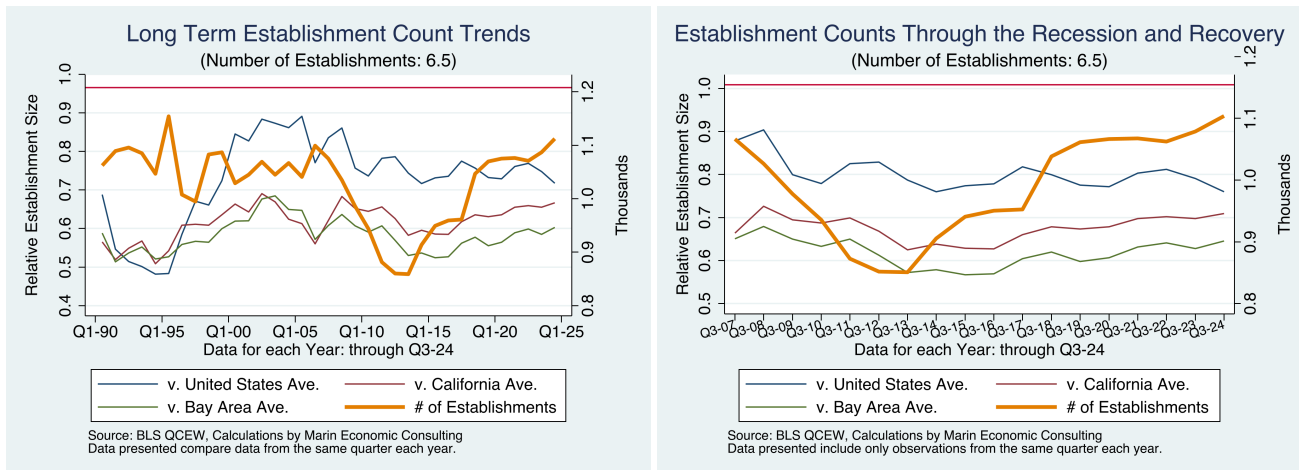


Figure 4 - 10: 23: Construction



5. Descriptions and References

The contents of this report illustrate the evolution of Marin County establishment size patterns over time. There are several types of data presented. They include:

Establishment Counts: Number of establishments that employ non-farm payroll employees in each industry.

Average Size: The average number of non-farm payroll employees in each establishment by industry.

Relative Establishment Size: Relative establishment size is indicated by the ratio of the establishment size locally (by industry) to the average size in some broader geography. When indicating relative size versus California, it is the region's relative size divided by the relative size of establishments in California. Therefore, values greater than one indicate larger establishments locally in the industry in question and values less than one indicate smaller establishments on average. Relative establishment sizes are presented versus the Bay Area, California, and the United States, separately.

LQ: LQ is used as a shorthand in the graphs for Relative Establishment Size. This is used because it is comparable in concept to Location Quotient, which is the ratio of employment shares. The values presented in the graphs are ratios of establishment sizes.

The data underlying this report are from the Bureau of Labor Statistics: Quarterly Census of Employment and Wages (QCEW). These data are available on a quarterly basis, generally with a 5 month lag from the end of the quarter to the release of the data.

QCEW: The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment and wages reported by employers covering 98 percent of U.S. jobs, available at the county, MSA, state and national levels by industry. <http://www.bls.gov/cew/home.htm>

Time Period: The data extend from Q1-1990 through Q3-2024

Seasonality: There is a significant seasonal component to many industries. The QCEW data are not seasonally adjusted. Rather than seasonally adjusting the data, most comparisons in this report are between the same quarter in different years. The data presented are therefore the actual employment levels compared across years.

A particular focus of this report is on the post-Great Recession recovery. This is accomplished by comparing the most recent quarter of data to the same quarter in 2007, the last non-recessionary year for most of California and the United States.